SAP Training

BEACON
North Carolina
Office of the State Controller

Organizational Management Overview OM200

Slide 1

Notes

Welcome to the BEACON SAP *Organizational Management Overview* training. The Organizational Management (OM) module is used to define and maintain org units, job classes, positions, and persons occupying positions. It is based on a concept of creating and linking objects. This in turn establishes relationships and inheritance of attributes.

Brain Teaser Trivia

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Slide 2

Notes

SAP Training — Welcome and Introductions

Welcome to the *Organizational Management Overview* course.

- Introductions
- Sign-in sheet
- Tent cards
- Rest rooms
- Breaks
- Parking Lots
- Classroom etiquette
    - Cell phones off
    - No side conversations

Slide 3

Notes

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.
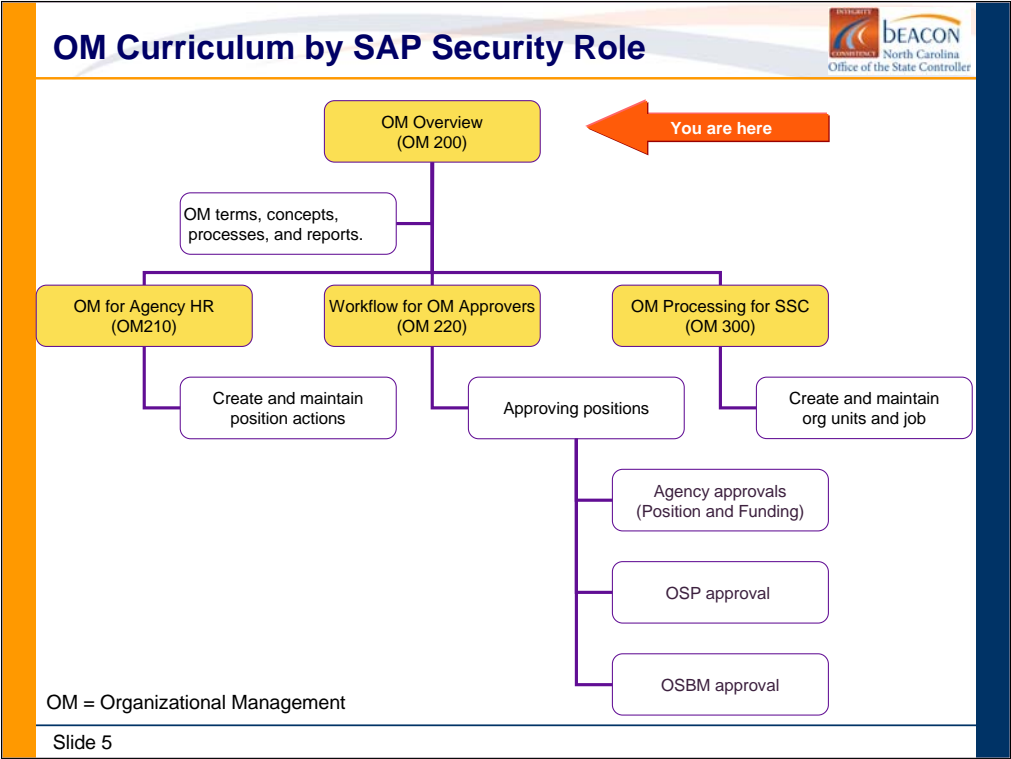
Prerequisites

- Pre-requisites
  - BEACON Overview, BC100
  - SAP Basic Navigation, BC110
  - Personnel Administration Overview, PA200

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Notes

Please notify your instructor by raising your hand if you have not completed all of the listed prerequisite courses. This course is for those individuals working at state agencies and BEST Shared Services who have been granted authorization to display the organizational structure.

OM200 – Organizational Management Overview

OM Curriculum by SAP Security Role

- OM Overview (OM 200) — You are here
- OM terms, concepts, processes, and reports.
  - OM for Agency HR (OM210)
    - Create and maintain position actions
  - Workflow for OM Approvers (OM 220)
    - Approving positions
      - Agency approvals (Position and Funding)
      - OSP approval
      - OSBM approval
  - OM Processing for SSC (OM 300)
    - Create and maintain org units and job

OM = Organizational Management

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Notes

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Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Course Review

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Notes

Course Objectives

Upon completion of this course, you should be able to:

- Define Organizational Management (OM)
- Identify components of the OM structure
- Display the organizational structure in SAP for your agency/department
- Identify OM reports

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Notes

This course is intended to give HR professionals an understanding of SAP's Organizational Management module. This course will provide you with demonstration and practice for displaying the organizational and staff assignment structure.

Strategy for Training

- **Tell me**   **Concepts**
  Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

- **Show me**   **Demonstrations**
  Instructor will demonstrate job-related tasks performed in SAP – HANDS OFF

- **Let me**   **Exercises**
  Student will complete the exercises which allows for hands-on practice in class – HANDS ON

- **Support me**   **Availability**
  Instructor will be available to answer questions while the students complete the exercises.

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Notes

The *Organizational Management Overview* Student Guide provides a copy of the PowerPoint presentation used in the classroom training. You will observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises to practice in the SAP training environment.

Reference materials

- Student Guide
- Job Aids
- Other resources
    - Online help
    - Simulations
    - Work instructions

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Notes

Simulations let you practice using SAP in a clearly defined and safe environment. Each simulation has instructions to guide you through the task. Simulations are available only for select transactions.

Online help

- Provides step-by-step procedures by screen
- Includes links to complete step-by-step procedures that you can print
- Includes links to simulations

To access BEACON Help, select the **Help > BEACON Help** menu option from any SAP ERP screen.

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Notes

Your Training Responsibilities

- Attend the applicable training class
- Be actively involved and participate in training
- Practice after training
- Pass the Level 2 skills assessment

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Notes

This course, as is true with all of the HR courses, is not designed for your specific Division or Agency procedures and policies. The training does not include all of the scenarios you encounter in your current job role. Instead, the courses in the Organizational Management curriculum are designed with two purposes in mind:

- To give you the basic knowledge and skills you need in order to perform your tasks in the SAP application as well as to perform any related business processes

- To demonstrate how you can further develop your skills by using the classroom materials, Work Instructions, Online Help and practice sessions to continue your SAP education after training is completed.

As you can see, you play an active role in your training development. The BEACON SAP HR/Payroll training is designed to ensure that you have the information you need in order to perform your duties and responsibilities.

Icebreaker Activity – SAP Navigation Tip

When asked by your instructor, please introduce yourself by stating your:

– Name
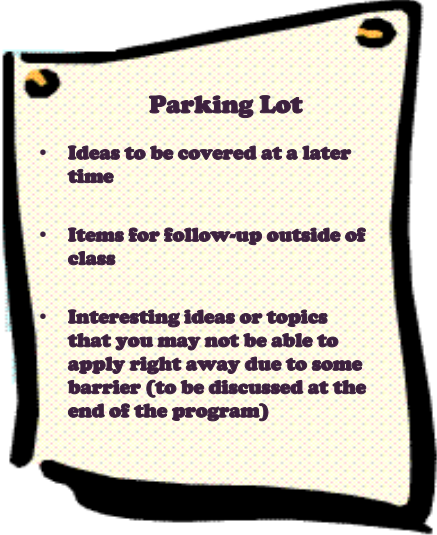– Job role
– Agency
– Assigned SAP navigation tip

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Notes

This icebreaker serves as a quick review of some key SAP navigation tips that were presented in *SAP Basic Navigation*, BC110 web course.

Notes

The *Parking Lot* will be used to record any concerns, expectations, and questions that cannot be answered during the class. If needed, your instructors will follow up with answers to questions that could not be answered in class.

When you think of a concern, ask the instructor. If the instructor /navigator cannot answer the question, it will be forwarded to the BEACON Training office. The Training Solutions Center will contact the subject matter experts to determine an answer and will notify the instructor of the answer.

The instructor will share the answer if it is received before the end of class. If an expectation or concern cannot be addressed in class, the instructor will place it on a parking lot, research it, and provide the class with a response at a later date.

Brain Teaser Trivia

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fish

na

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Notes

Credits: Most of the Frame Games© used were created and authorized for use on the NIEHS Kids Pages by Terry Stickels, who also presents new Frame Games© on a weekly basis for USA WEEKEND.com.

Course Map – Organizational Management Overview

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North Carolina
Office of the State Controller

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Course Review

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Notes

Lesson 1 Objectives

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North Carolina
Office of the State Controller

Upon completion of this lesson you should be able to define key Personnel Administration (PA) concepts.

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Notes

This course is designed to provide you with general knowledge about Personnel Administration and how to display data.

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Notes

Before we explain in more detail the purpose, attributes, and relationships of each OM object, it is important to review SAP's foundation data structure for employee master data which is comprised of the **Enterprise Structure**, and the **Personnel Structure.** This structure is displayed on the *Organizational Assignment* (0001) infotype. The above slide shows the Organizational Assignment infotype for Dick Amoroso, a sample employee. Let's take a look at each of the data fields within these two structures.

NOTE: We will review the organizational structure in the next lesson.

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Notes

SAP uses the following areas to organize organizational and employee information:

- Enterprise Structure
- Personnel Structure
- Organizational Plan Structure

The Enterprise structure defines the legal structure of the State of North Carolina and is comprised of:

- Company Code
- Personnel Areas
- Personnel Sub-Areas
- Cost Center
- Business Area
- Fund
- Functional Area

Notes

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Notes

A **Company Code** is an HR integration point with SAP financial accounting applications and is an integral part of an employee's HR record through the connection with Personnel Administration. The Company Code represents the highest levels of the organizational structure. The State of North Carolina will use two company codes: NC01 and NC02. All agencies, except Transportation and Employment Security Commission, use NC01.

NC01 – State of North Carolina - NCAS
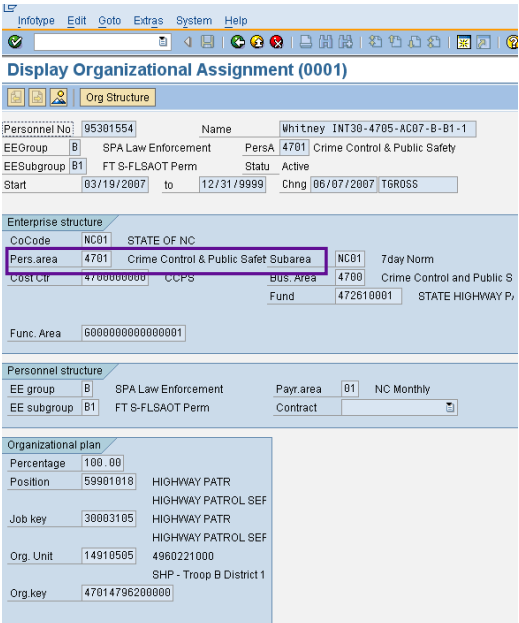
NC01 represents primary government agencies and component units which use NCAS (North Carolina Accounting System) as their main accounting system. Until NCAS is replaced, payroll financial postings from company code NC01 will be interfaced to NCAS.

NC02 – State of North Carolina – DOT & ESC

NC02 represents any primary government agency or component unit that does *not* use NCAS as its primary accounting system, but is included in the HR/Payroll project for processing payroll transactions. These agencies or component units have their own accounting system and chart of accounts, and require payroll entries to be interfaced to their accounting systems.

Personnel Area

- Designates specific agency for Payroll
- Related to Company Code
- Assigned at the position level and defaults to the employee's record

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The **Personnel Area** is tied directly to the Company Code and is used by Payroll to identify the specific agency for whom the employee works. A Company Code can include one or more Personnel Areas. Personnel Area is important for selecting dates for reporting. Personnel areas determine where wages and salaries are posted and from where they are paid. Some examples are:

Company Code NC01
- 1401 State Controller
- 1601 Environmental and Natural Sciences
- Z101 State Personnel
- 8701 School of Science and Math

Company Code NC02
- 1501 Transportation
- 4401 Employment Security Commission

Notes

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Subarea – Personnel Subarea

Notes

The **Personnel Subarea** further defines the Personnel Area. The Personnel Subarea is identified by a four alpha-numeric code and has been designed to identify various working schedules so that Time Management can define groups of specific time entry rules (for example, 7-day schedule; 24/7 etc.) Personnel subarea groups similar jobs to conform to time and attendance rules. There are five key elements that determine an employee's Personnel Subarea assignment:

- Calendar assignment
- Relationship to the state (regular vs. temp vs. elected vs. contractor)
- Quota accrual rules/requirements
- Work schedule rule (to restrict the available work schedules)
- Working period (which defines Overtime period)

See the *Personnel Area and Subarea (PSA)* Job Aid for detailed information concerning the relevant PSAs associated with each Personnel Area.

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Notes

The **Cost Center, Fund, and Functional Area** fields will default from the Organizational Unit and therefore be grayed out. There is only one Functional Area for the whole *State*. There is only one default Cost Center and one default Fund per *Agency*. Neither the Fund or the Functional Area are associated with the position.
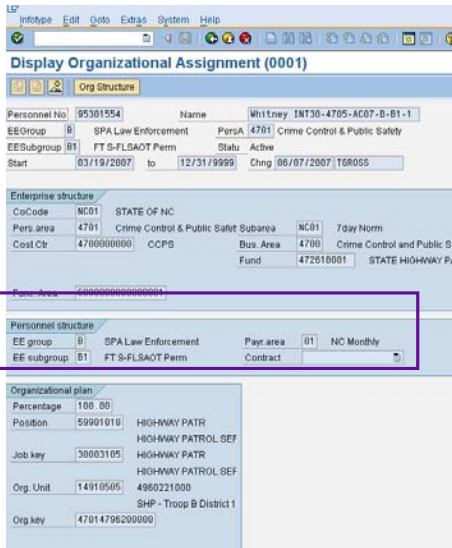
A **Business Area** is a unit within a company code used by Finance. The Business Area is the lowest level at which a complete set of income statements and balance sheets can be processed. The Business Area represents a separate area of operations or responsibilities within an organization.

In most cases, the Business Area represents an Agency. The exceptions are:

- Justice (SBI)
- HHS (403-b)
- CCPS (Highway Patrol)

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Notes

The Personnel structure is comprised of:
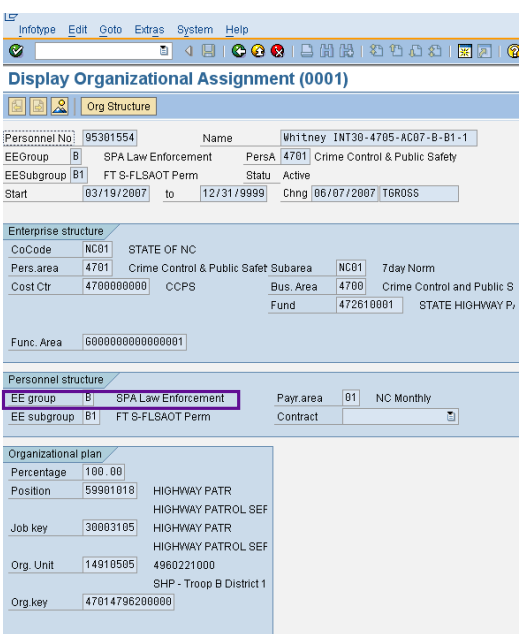
- Employee Group
- Employee Subgroup
- Payroll Area

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Notes

In addition to identifying the employment status and the employee's relationship to the State, the **Employee Group** also establishes business rules for calculating leave and personnel calculation rules for managing employee pay. This also provides for benefit eligibility determination in concert with further use in alternative reporting combinations. The table below illustrates just a few examples of the State of North Carolina Employee Groups.

A   SPA Employees (Subject to Personnel Action employees)

B   SPA Law Enforcement

O   Supplemental Staff (temporaries, pick up firefighter, National guard, contractor, etc.)

See the *Employee Groups and Subgroups* Job Aid for detailed information concerning the Employee Group field values.

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Notes

The **Employee Subgroup** defines whether the employee is subject or not subject to the Fair Labor Standards Act (FLSA) overtime, and full-time/part-time status. It is also used to determine other types of Personnel Calculation Rules specific to the combination of groups and sub-groups. The employee subgroup for the Personnel Calculation Rule allows payroll to define different payroll procedures for different employee subgroups. Some examples are:

- **A1   FTN-FLSAOT Perm [Full Time Not (subject to) - FLSA Overtime – Permanent]**

- **B1   FTS-FLSAOT Perm [Full time Subject (to) - FLSA Overtime – Permanent]**

- **Y8   PTS-FLSAOT Trne [Part-time Subject (to)- FLSA Overtime –Trainee]**

The employee groups and subgroups are the same as those used in PMIS; however, they are organized very differently. There are many combinations of Employee Groups and Subgroups in SAP. If the incorrect Employee Group and Subgroup are entered, it impacts time, work against, dual employment, benefits, and pay. As discussed in PA200, you can continue to see why accuracy is so critical when data is entered.

See the *Employee Groups and Subgroups* Job Aid for details concerning the various groups and subgroup combinations.

Payroll Area

- Describes the pay frequency and payroll cycle for each employee
- Defaults based on personnel area, personnel subarea, employee group, and employee subgroup
- **Examples** – Monthly, Biweekly

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Notes

The **Payroll Area** is derived from a combination of personnel area, personnel subarea, employee group and employee subgroup. The payroll area determines payroll cycle.

Payroll Area

- Used as a selection to execute SAP payroll.
- Determines pay period, start date, end date, pay date and payroll frequency.

Payroll area   3 Entries found

Restrictions

PAr	Payroll area text
01	NC Monthly
04	NC Biweekly
99	Non-payroll-relevant

- Each employee is assigned a payroll area.

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Notes

Payroll accounting is performed for each payroll area.

SAP uses payroll areas to group together employees from whom payroll is run at the same time, and also to set the dates for the payroll period.

All temporary positions are in the biweekly cycle!

Lesson Review

In this lesson, you learned to identify and define basic SAP Personnel Administration (PA) concepts.

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<u>Notes</u>

Knowledge Check – Lesson 1

T	F	Question
		1. The Employee Subgroup arranges employees by their type of status, and establishes business rules for calculating leave.
		2. The Employee Group defines more detailed and specific processing for payroll calculation rules, for example, if employee is subject or not subject to FLSA.
		3. The Payroll Area describes the pay frequency and payroll cycle for each employee.
		4. The Company Code is the highest level of the company structure as defined by Finance.
		5. The Personnel Area further defines employees in order to identify various working schedules so that Time Management can define groups of specific time entry rules.
		6. The Personnel Subarea is used to identify the specific agency for whom the employee works.

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Notes

OM200 – Organizational Management Overview

Course Map – Organizational Management Overview

Lesson 1: PA Overview

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Lesson 5: Course Review

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Notes

BrainTeaser Trivia

beacon
North Carolina
Office of the State Controller

1.

2. Blame

3. Blame

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Notes

Lesson 2 objectives

Upon completing this lesson, you should be able to:

- Define key concepts of Organizational Management (OM)
- Define key terms related to OM
- Identify components of the OM Structure
- Describe the difference between a job and a position

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Notes

What is OM?

Slide 34

Notes
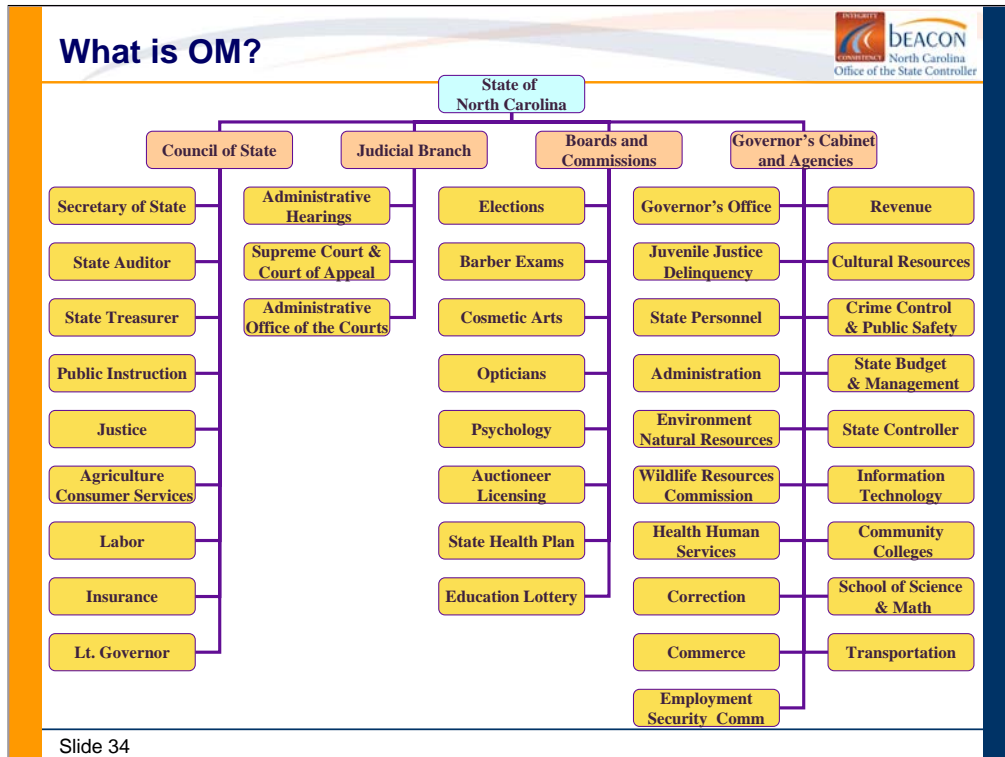
OM is a component within the HR Module that maintains a model of the State of North Carolina's organizational structure. The OM module provides a clear picture of the organization at any point in time: past, present or future. This information allows an organization to be proactive in planning for future human resource needs.

- OM is used to set up organizational and reporting hierarchy.
- OM uses relationships to manage the display of data.
- OM is used to construct and maintain an enterprise organizational chart.
- OM groups employees by function / business unit / geographical area.
- OM defines the cost distribution and salary for each position.

NOTE: OM actions/changes relate to PD118 actions in PMIS.

Organizational Management Objects

OM

DESCRIBES

Job (Class)

CONTAINS

Position

Organization Unit

PA

HELD BY

Person

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Notes

Organizational Management is based on the concept that each element in an organization represents a stand-alone object with individual characteristics. These objects are created and maintained separately, then linked together through relationships.

Relationships of OM Objects

Slide 36

Notes
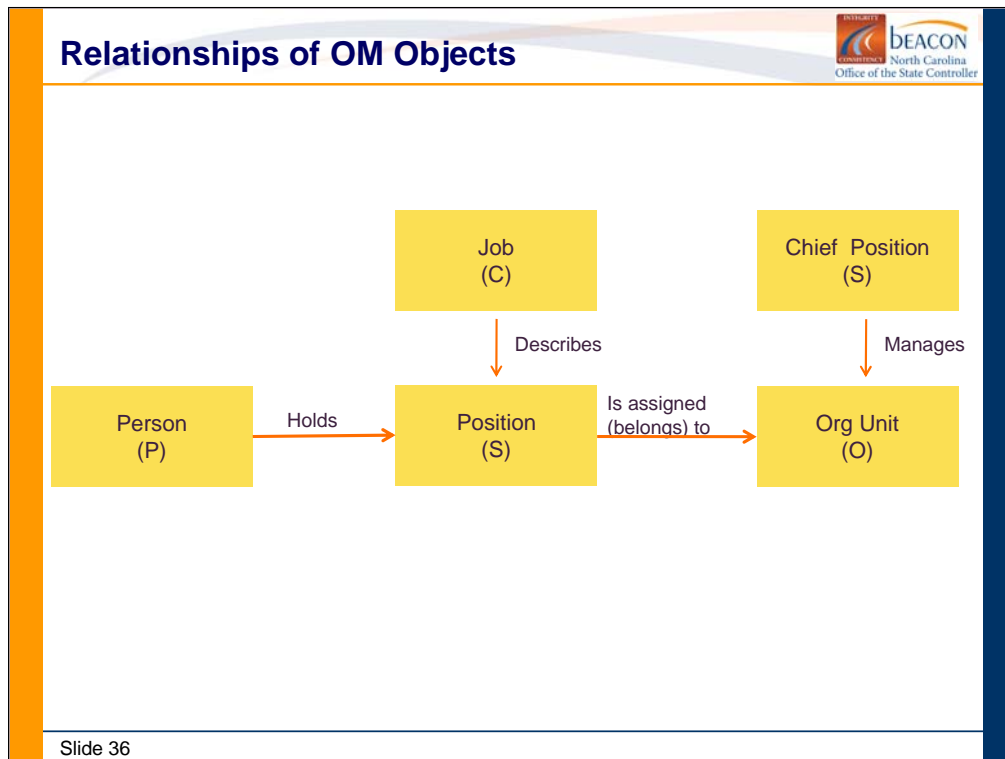
The primary elements that comprise an organizational hierarchy are:

- Organizational Unit (org unit)
- Job
- Position
- Persons
- Cost Centers

Objects have:
- Attributes
- Relationships

You begin with the org unit. Within the org unit, a position is created. The position is linked to a job, and a person fills the position.

Org Unit (O)

Department of Environment and Natural Resources	Org Unit (O)
Office of the Secretary	Org Unit (O)
Water Quality Division	Org Unit (O)
Surface Water Protection Section	Org Unit (O)
Eastern NPEDS Program	Org Unit (O)

Slide 37

Notes
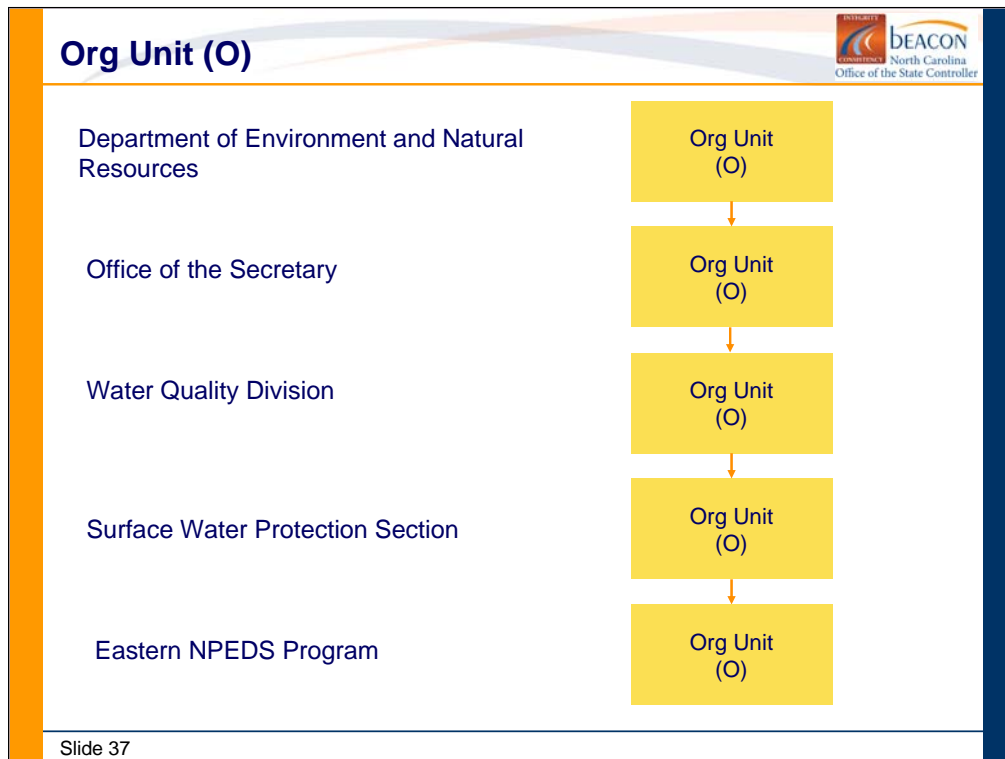
The SAP code for an org unit is "O".

An Organizational Unit (org unit) is the functional unit of the State of North Carolina (or any organization).

An org unit can be the State of North Carolina, Agencies/departments, divisions, sections, branches, work groups, or units throughout the organization.

An org unit number is eight digits long and begins with a "2".

Org units are linked together to represent the organization charts.

An unlimited number of org units can be created within an organizational plan.

Relationships between org units are identified to determine the hierarchy within the organizational structure.

Org units are defined by agency/department.

Org units are maintained by OM Administrator at BEST Shared Services.

Position (S)

A Position
- Belongs to an org unit.
- Represents a set of tasks performed by a person.
- May be classified as Chief position.
- May be vacant or occupied by persons (employees).
- A number of positions are based on the same job.
- As a rule, each position represents one employee.

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Notes

The SAP code for a Position is "S".

The position number is assigned sequentially by SAP. Hence there is no logic to the number assignment.

The position number is eight digits long and begins with a "6".

Position to Position Relationships

A Position can

- Report to another position, such as the Personnel Analyst position "reports to" the Human Resources Director.
- Be a line supervisor of another position, such as the Human Resources Director "is line supervisor of" the Personnel Analyst.

Reports to

Is line supervisor of

**Position:
Personnel Analyst**

**Position:
Human Resources
Director**

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Notes

The formal relationships between positions is used to build the **Reporting Structure.**

Relationships of OM Objects

| Position (S) | Is assigned (belongs) to → | Org Unit (O) |

Slide 40
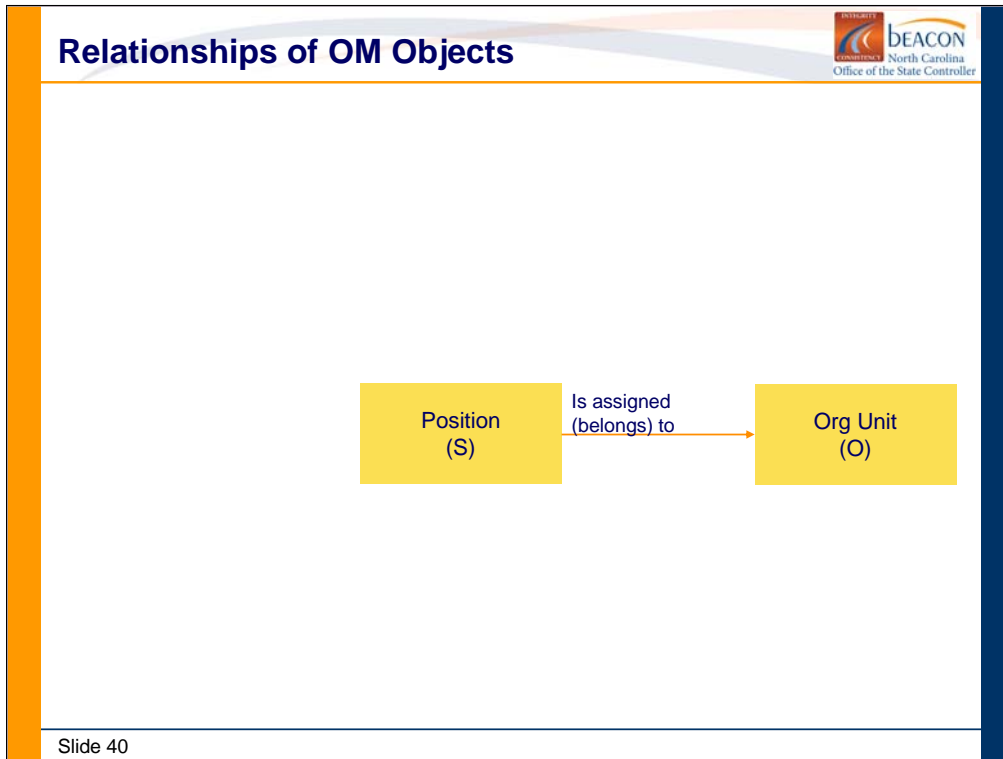
Notes

A Position belongs to an Org Unit.
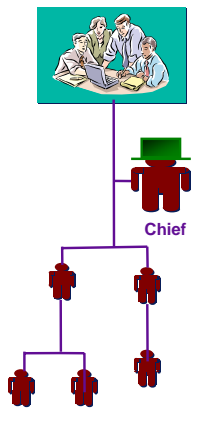
An Org Unit incorporates a Position.

Positions inherit attributes of job and specific classifications of work duties are appended.

Chief Position

- Manages the org unit and any subordinate org units
- One Chief per org unit
- Can be the Chief of multiple org units

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Notes

Some positions are designated as Chief positions to indicate span of control.

An org unit *is managed by* one position (a chief).

Job (C)

- Describes the general classification of functions and duties that are identical across the State
- Is not occupied by persons (employees)
- Is used as the basis for creating positions (Multiple positions can be described by one job)
- Defines EEO, job group, and census codes
- Is defined and created by OSP
- Maintained in SAP by OM Administrator
- Is part of a Job Branch which is part of a Job Family

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Notes

The SAP code for a job is "C".

A Job is the foundation from which positions are created.

A Job is a general *classification* of duties and attributes.

Typical attributes are: function, Job Family, FLSA status and role. One Job can be used to create many positions. A Job is identified by a unique number.

When you hear the term *class* or *classification* you will immediately know that a job is being referenced. Of course, the converse is also true—when you hear job, you will know it is a *class*.

A job number is eight digits long and begins with a "3".

Relationships of OM Objects

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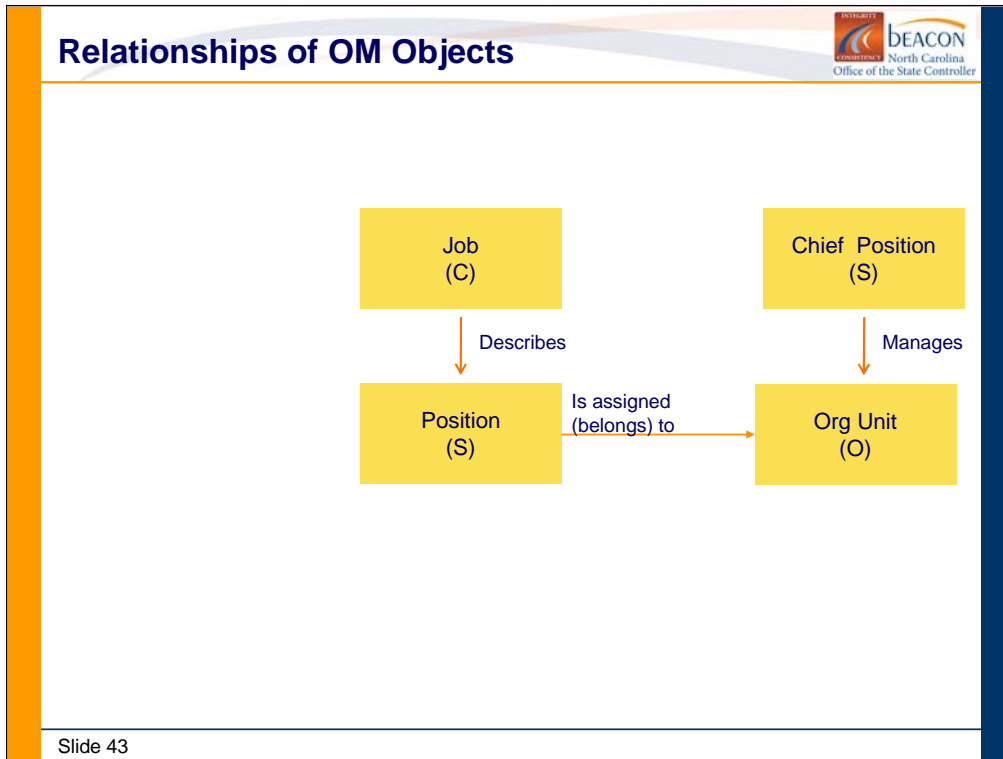
Notes

A job is a class.

Jobs are general classifications of tasks routinely performed together and is the template from which positions are created.

A Position inherit attributes of a job.

Job versus Position

Job	Position
• Defines general classification of functions and duties that are identical across the State	• Represents specific tasks performed by a person
• Has a one to many ratio to positions	• Has a many to one ratio to jobs
• Defines EEO, Job Group, and Census Codes	• Belongs to an org unit
• Is not held by a person (employee)	• Inherits attributes from the job and org unit
• Is the basis for creating positions	• Held by a person
• Is maintained by Shared Services	• May be classified as Chief position
	• Is maintained by Shared Services

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Notes

In the following example, there may be several different types of Office Assistant (OA) positions in the organization. Each OA position has its own specific tasks and duties; however, some general information is common to all OA positions. For example, the EEO, Job Group, Census Code, and some tasks are applicable to all OA positions. That general information is created in the job and then used as a template to create the various OA positions. The specific information pertinent to each OA position is then added at the position level.

Job – Office Assistant

Positions:

• Human Resources Assistant
• Accounting Assistant
• Inventory Assistant
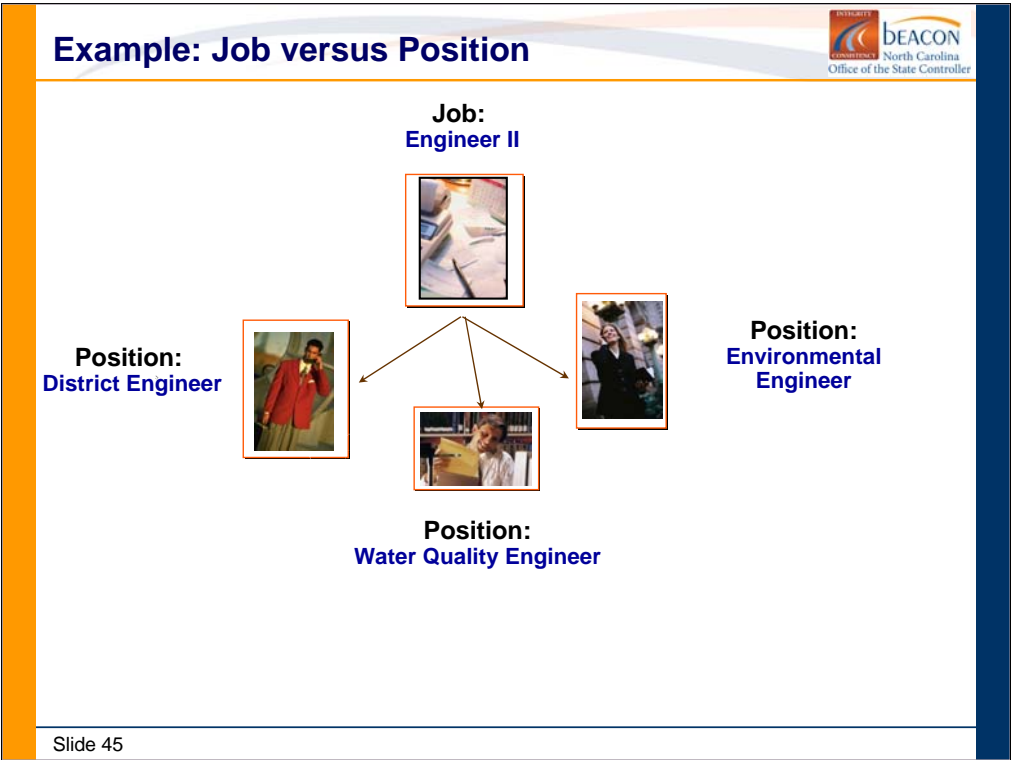
An example of a Job (class) and its related positions is engineering. There may be several different types of engineers in the organization. Each engineer position has its own specific tasks and duties; however, some general information is common to all engineer positions. That general information is created in the job and then used as a template to create the various engineer positions. The specific information pertinent to each engineer position is then added at the position level.

The relationship between jobs and positions is the same in both graded and banded jobs and positions.

Notes

Official Job (Class) Title	Position (Working) Title
• Engineer (graded)	• Water Quality Engineer • Air Quality Engineer • Building Systems Engineer • County Maintenance Engineer • Elevator Engineer • Environmental Engineer
• Forestry Technician (banded)	• County Ranger • Nursery Technician • District Ranger

Person (P)

- A person is assigned to a position.
- A person inherits the attributes of all related OM objects.
- Personnel data is created and maintained via Personnel Administration by
  - Agency HR
  - Employee Self-Service
  - Manager Self-Service
  - BEST Shared Services
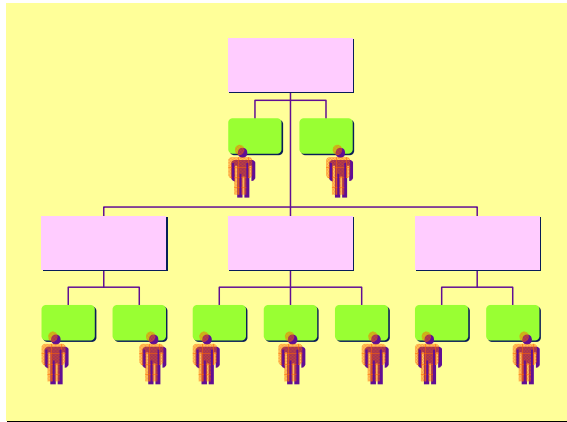
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The SAP code for a person is "P".

Persons represent employees and are the central object in the Personnel Administration module. The object Person refers to the physical person who fills a given position.

Slide 47
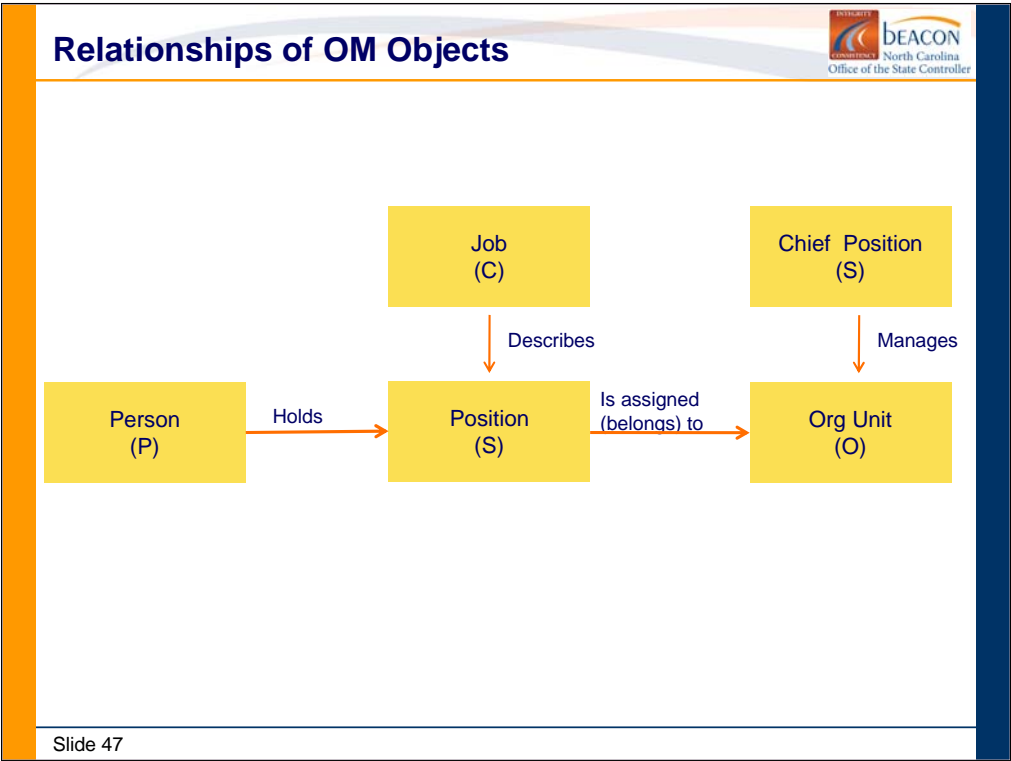
Persons hold (occupy) positions.

Notes
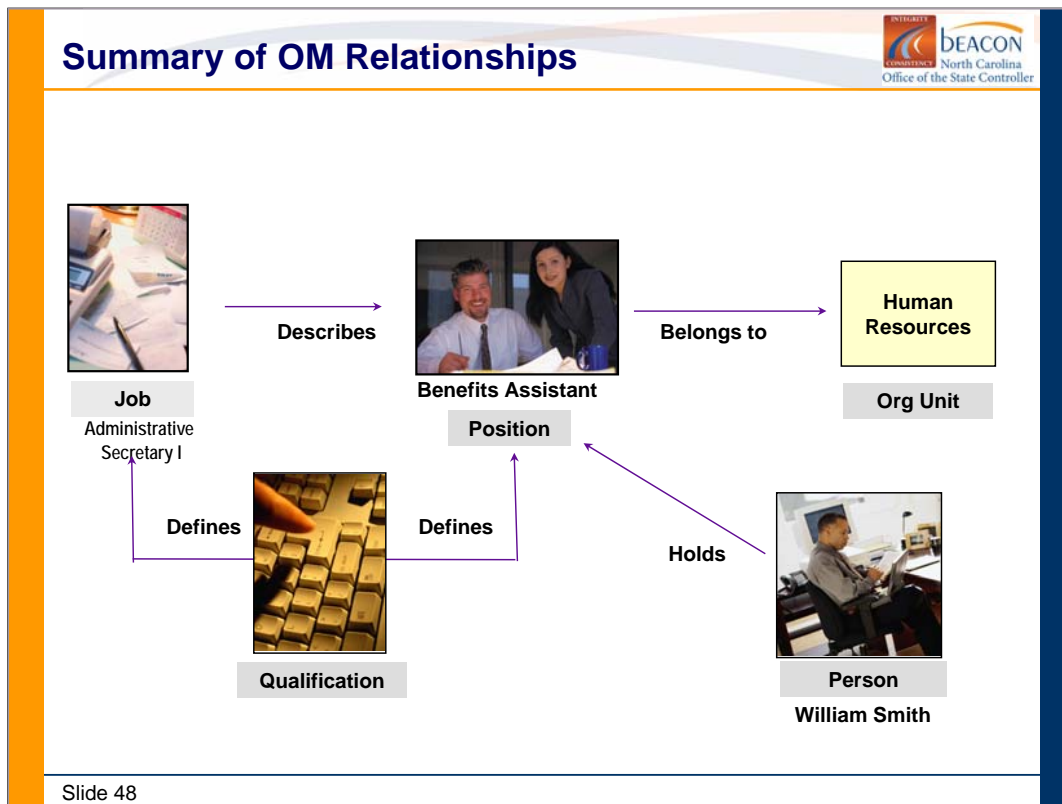
Summary of OM Relationships

Job
Administrative Secretary I

Describes

Benefits Assistant
Position

Belongs to

Human Resources
Org Unit

Defines

Qualification

Defines

Holds

Person
William Smith

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Notes

Organizational Management is based on the concept that each element in an organization represents a stand-alone object with individual characteristics. These objects are created and maintained separately, then linked together through relationships, such as those indicated above, to form a network which has the flexibility to handle human resources needs.

NOTE: The Qualifications object is currently not being used.

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Notes

In the first lesson, we reviewed the Enterprise and Personnel structures. Now that we understand the purpose of each OM object, let us now review the Organizational structure that is displayed on the *Organizational Assignment* (0001) infotype of an employee's master data record. The above slide shows the Organizational Assignment infotype for Dick Amoroso, a sample employee. Let's take a look at each of the data fields within these two structures.

NOTE: We will review the organizational structure in the next lesson.

Organizational Plan

Organizational plan

Percentage	100.00	
Position	54217251	003010307204
		TRANS ENGNR SUPVR
Job key	30004198	TRANS ENGNR
		TRANSPORTATION EN
Org. Unit	14200340	42G650000849
		DOT DOH DIV 3 TRAFFI
Org.key	1701	

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Notes

The Organizational Plan defines the hierarchical relationship between organizational management objects including org units, positions and jobs.

The staffing percentage indicates which percentage of an employee's time is to be spent in the position entered. The **Percentage** will always be 100% and identifies that the employee is working 100% of what he or she was offered and accepted. For example, if an employee accepted a full time position at $48,000, that employee's percentage will be 100%. By the same token, if a position is going to be shared, with two employees each working 20 hours at $20,000, each of those employee's percentage will also be 100% (because each employee is working 100% of what was offered and accepted, which is a 20 hour work week at $20k).

The **Position** displays the Position (working) title.

The **Job key** represents the Job (class) defined by OSP.

The **Org Unit** represents the agency/department that the position is assigned to.

Employee's Perspective

What task do I perform?

State
Agency HR
BEST SS

Organizational Plan

Who is my financial owner?

Company = State of North Carolina 1

Enterprise Structure

What type of employee am I?

EE Subgroup = FTN-FLSAOT Perm

Employee Group = SPA Employees

Personnel Subarea = 7-day Norm

Personnel Structure

Person

What is my agency/department?

Personnel Area = DENR

Enterprise Structure

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Notes

In summary, this slide shows how an employee is related to SAP's Foundation Structures.

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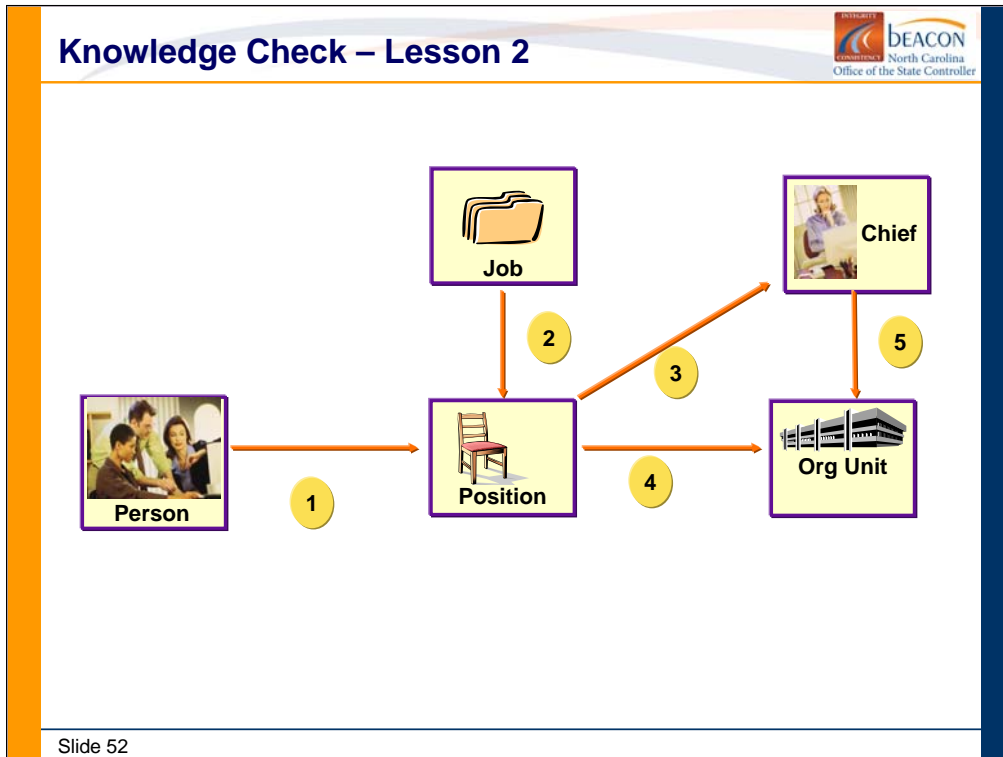
Notes

Map each of the following relationship phrases to the correct "to" and "from" arrow:

- Manages
- Is assigned to
- May be designated as
- Describes
- Holds

NOTE: The lines are numbered to help the instructor determine if your responses are correct.

Brain Teaser Trivia

<div align="center">

E E
a a
r r
t t
h h

</div>

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Notes

Credits: Most of the Frame Games© used were created and authorized for use on the NIEHS Kids Pages by Terry Stickels, who also presents new Frame Games© on a weekly basis for USA Weekend.com.

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Course Review

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Notes

Lesson objectives

beacon
North Carolina
Office of the State Controller

After completing this lesson, you should be able to display your agency's organizational structure using the Display for Org Units and Positions, PPOSE, transaction.

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Notes

PPOSE – Display Org Units and Positions

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Notes

The transaction PPOSE – Display Org Units and Positions is used to review org units and positions in an organization. An organizational plan can be made with many object types, although these three basic object types are the building blocks:

- Org Units
- Positions
- Persons (Persons hold positions that are defined by jobs.)

Using PPOSE

BEACON
North Carolina
Office of the State Controller

- Organizational and Staffing Display transaction can be used to view the existing organizational structure.
- Within Organization & Staffing Display, you can:
  - Display org units
  - Display positions
  - Identify "Chiefs"
  - Display holders of positions

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Notes

This transaction can be used to display the State's organizational structure and all the elements included in the structure, including org units, positions, jobs and people. You can also use this transaction to find a position number, which is required to complete personnel actions such as new hire.

You access Organizational & Staffing Display by one of the following methods:

- The Easy Access menu: *Human Resources > Organizational Management > Organizational Plan > Organization and Staffing > PPOSE Display*
- The shortcut T-code *PPOSE*

NOTE: T-code is an abbreviation for transaction code.

Exercise #3.1 – Logging on to SAP

Follow along with your instructor and use the steps and data presented below to log on to SAP in the classroom.

- Access the SAP portal Training web page.
- https://trg-mybeacon.its.state.nc.us
- Enter the User ID and password that is assigned to your classroom PC.
- Click on the Log on button.
- Click **Yes** to confirm the security message displayed.
- Click on the SAP GUI tab.
- Click on the training client specified by your instructor.
- Stop when you have reached the SAP Easy Access screen.

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Notes

Instructor Demonstration #3.2

- Display Organizational Structure
  - Perform this transaction to display an organizational structure of org units, which represent the divisions, sections, work groups etc. in your agency or department.
  - Information:
    - Org Unit – Office of State Controller
    - Staff assignment
      - Chief position
      - Positions
        » Occupied
        » Vacant
      - Persons (Holders of positions)

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Notes

1. Select the menu path or type **PPOSE** in the command line of the SAP Easy Access screen and then press Enter.

   NOTE: To display the transaction codes in the menu structure, select the **Extras > Settings > Display technical names** menu option.

3. In the **Find by** box, click on the triangle by "org unit."

4. Click on **Structure search**. This will display one or more org units in the bottom left box on the screen (depending on the org units with which you have authority to work).

5. Click on the triangles to find the org unit you desire to view.

6. Double-click the selected org unit to display a list of positions assigned to the org unit. This structure will be displayed on the upper right side of the screen.

7. Click on the **Column Configuration** icon and then select additional information to be displayed for each position or holder.

8. Click on the triangle by any position title to view the employee assigned to the position.

Object Manager

The *Object Manager* consists of the **Search Area** and the **Selection Area**.

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To hide or show the object manager, select the *Settings* menu option.

Notes

Organization & Staffing Display screen layout
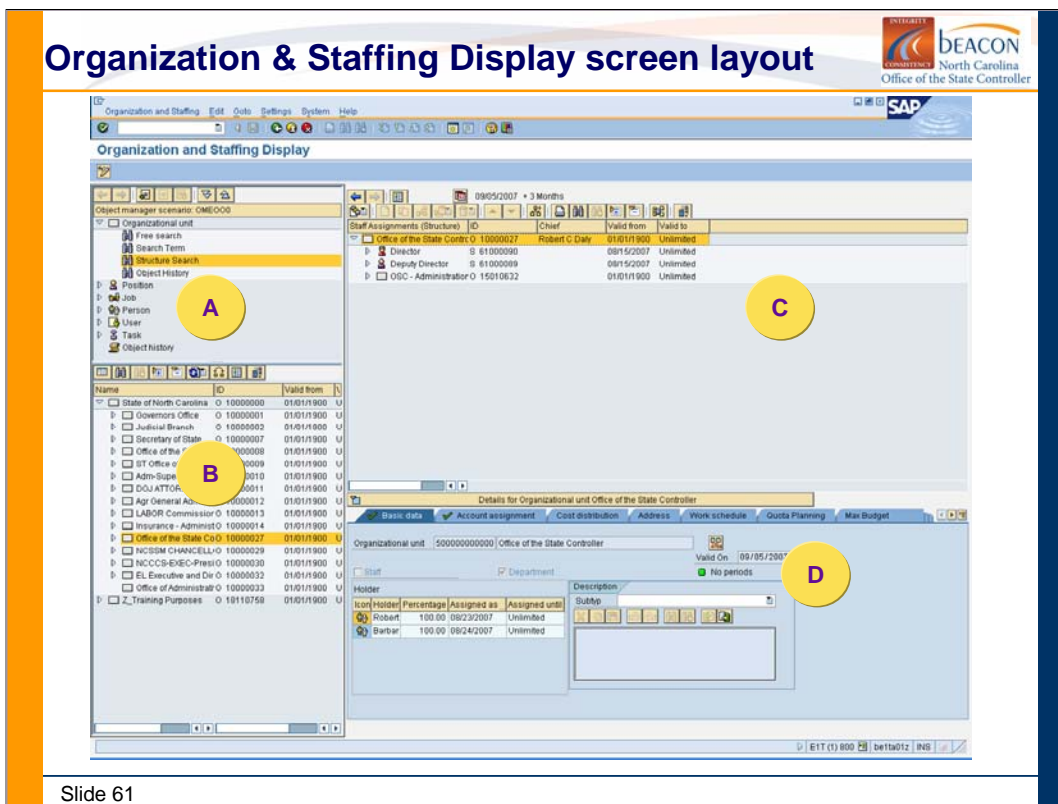
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Notes

This transaction allows the user to display the existing organizational structure in a graphical view.

A - Search Area - The Search Area allows users to search for organizational information based on:

- Org Unit
- Position
- Job
- Person

B - Selection Area - The results of searches performed in the Search Area are displayed directly below the Selection Area. You can modify the search results by sorting or filtering. You can add and delete columns to easily find the object. Once the user selects an item from the Selection Area, the results are displayed in the Overview and Details Area.
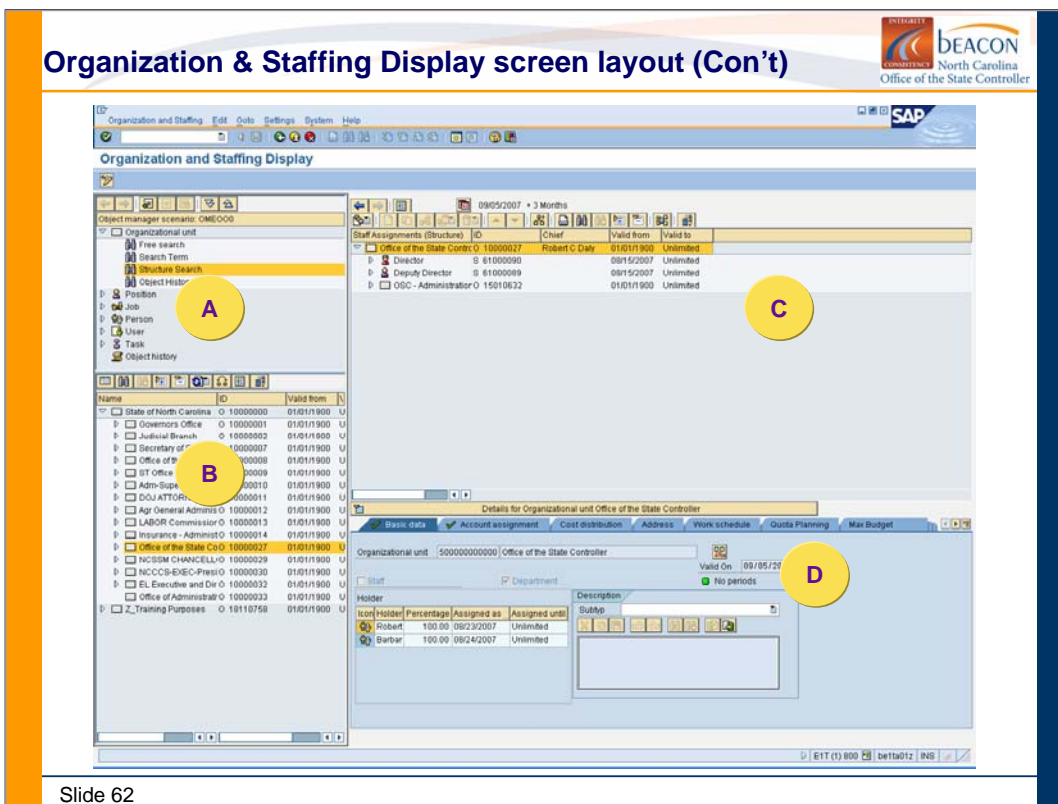
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C - Overview Area - The Overview Area lists the:

- Organizational Structure
- Code
- Key
- Relationship
- Chief position
- Valid from, Valid to
- Assigned to
- Assigned until

When the user selects items on the Overview Area, for example, selecting an org unit, the details for that selection display directly below the Overview Area in the Details Area.

D - Details Area - The Details Area lists the:

- Basic Data
- Account Assignment
- Cost Distribution
- Plan quota

The Details Area displays more information about the object selected in the Overview Area. The name of the tab changes depending on the object type highlighted in the Overview Area.

Notes

Exercise #3.2

- Display the organizational structure
  - In this exercise, you are the new HR manager at the Office of the State Controller. You want to display the org units and positions for the OSC/Administration Division. You will use transaction code PPOSE to perform a structural search to display the organizational structure and staffing assignments.

Instructions
1. Log on to the SAP training client, using the User ID and password that has been assigned to your classroom PC.
2. Follow the steps listed below in the Notes section to complete the necessary steps.
3. Answer the questions listed below.

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Notes

1. Type **PPOSE** in the Command field on the Easy Access screen and click or press Enter.
2. At the Organization and Staffing Display, select the **Organization Unit** mode.
3. Select **Structure Search** in the Search Area.
4. Click the node for the **State of North Carolina** in the Selection Area.
5. Click the node for the **Governor's Cabinet and Agencies**.
6. Click the node for the **State Controller**.
7. Double-click the **State Controller's Office**.

Questions:
  a) What is the org unit number of the State Controller's Office?
  b) What is the name of the org unit that reports directly to the State Controller's Office org unit?
  c) What are the names of the positions that directly report to the State Controller's Office?
  d) What is wrong with the way that the State Controller and Executive Assistant positions are displayed?
  e) How many positions report directly to the State Controller's Office?
  f) Which positions are occupied and what are the names of the persons who hold the positions?
  g) What is the title of the position that manages the State Controller's Office org unit? How do you know?
  h) If you want to see the org units that report to the SC Administration org unit, how would you do that?

8. Use the **Collapse icon** in the Overview section to close all of the org units.
9. Use the **Collapse icon** in the Selection section to collapse all of the org units.

Instructor Demonstration #3.3

- Display Org Unit Details
  - Perform this transaction to display the master data details for an org unit.
  - Information:
    - Org Unit – Office of State Controller

NOTE: The details are different for each OM object (org unit, position, and job).

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Notes

In a moment your instructor will demonstrate how to display the details for an org unit. Please refer to the next three pages of your student guide and follow along while your instructor demonstrates and explains each tab.

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Notes

The object type for an org unit is "O".

The numeric object ID for an org unit will begin with the number 2.

The twelve-digit code, also referred to as the abbreviation, short-text, or number, is logically assigned by the agency. The first two digits identify the agency in PMIS.

The forty-character description for the org unit is "smart coded" to facilitate your data searching and reporting. The description will start with the description of its superior (parent) org unit. For example, the Administration department of the State Controller's Office org unit description is *SC Administration.* This description includes the description of its parent org by using "SC" to denote State Controller's Office. The BEACON project org unit description is *SC ADM BEACON*. This description includes the two superior org units in its description by using "SC ADM" to denote both the State Controller's Office the Administration department org units.

Numbering Conventions

    Org Units: 20000000 to 29999999

    Positions: 60000000 to 69999999

    Jobs: 30000000 to 39999999
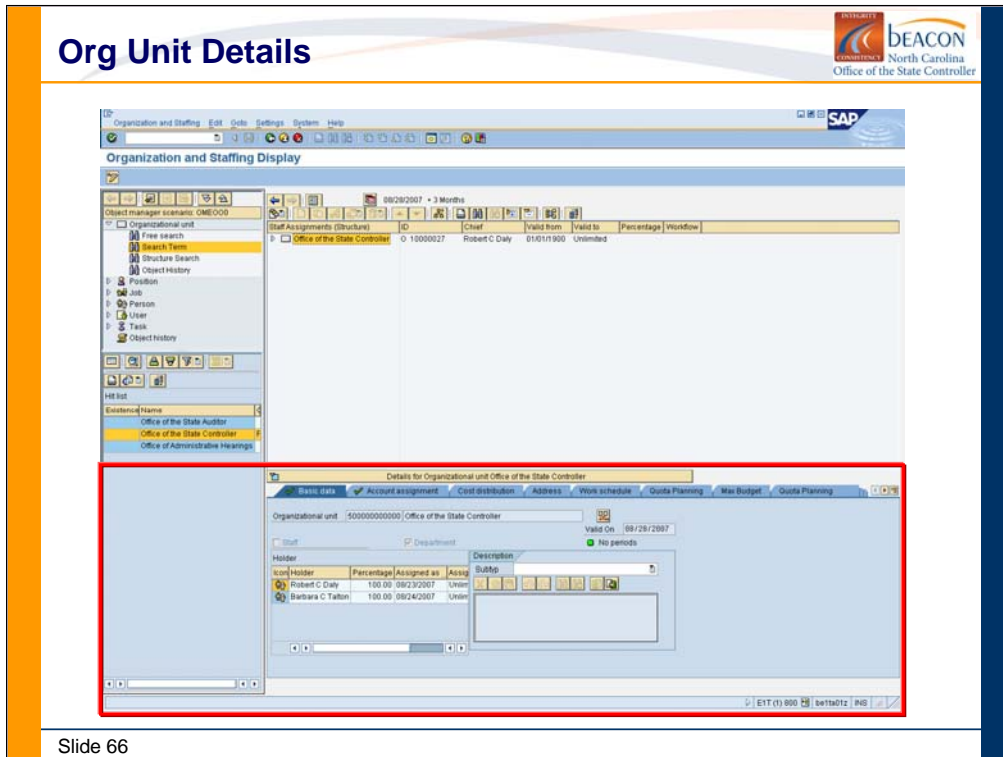
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Notes

Characteristics for each org unit are stored on tabs in the *Details* section of the *Organization and Staffing Display* screen. Some characteristics of org units are inherited by subordinate org units and positions if they have not been maintained. BEACON SAP is using these tabs to define org units:

• Basic data

• Account assignment

• Work schedule

The remaining tabs are not used.

Org Unit Details (Basic data tab)

Details for Organizational unit Office of the State Controller

Basic data | Account assignment | Cost distribution | Address | Work schedule | Quota Planning

Organizational unit 500000000000 Office of the State Controller

Valid On 08/28/2007

Staff | Department | No periods

Holder

Icon	Holder	Percentage	Assigned as	Assig
	Robert C Daly	100.00	08/23/2007	Unlim
	Barbara C Talton	100.00	08/24/2007	Unlim

Description

Subtyp

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Notes

The *Basic data* tab provides org units with a unique identity. In the two *Org Unit* fields, enter a short and long description for an org unit. These descriptions are displayed in the organizational structure. The Department indicator is checked for all org units to enable payroll accounting. The employees that hold positions are also displayed in the *Holder* table.

Org Unit Details (Account assignment tab)

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Notes

The *Account assignment* tab specifies the controlling area, master cost center, company code, business area, personnel area and personnel subarea for an org unit. The data is also used as default values in *Personnel Administration*.

Data is inherited by subordinate positions and org units, as long as they have no direct assignment of their own. Inheritance occurs as follows:

- Account assignment features are inherited by subordinate org units and positions if they have not been maintained.

- If account assignment features have been specified for a superior org unit, these are overwritten by entries on the *Account Assignment* tab page for a subordinate org unit.

Org Unit Details (Work Schedule tab)

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Notes

The *Work schedule* tab assigns 40 hours as the default general working time for the unit itself and for all objects under it in the organizational structure. The general working time is assigned to all subordinate org units, positions or employee groups if they have no individual working time assignment. Individual working time assignments of subordinate objects override the work schedules they inherit from superior org units. If all positions assigned to an org unit have a different work schedule, then you can change the org unit's work schedule and all positions will then inherit the value.

Exercise #3.3

- **Display Org Unit Details**

  – In this exercise, you are the HR manager at the Office of the State Controller. The Risk Mitigation org unit was recently created. The Agency Deputy Director has asked you to review the details of the org unit to ensure accuracy. She wants you to check the agency organizational structure to verify that Jennifer Johnson is the holder of the Accountant II position.

Instructions -

Hint: You are looking for the OSC-Admin Risk Mitigation org unit that reports directly to the *OSC Administration Division*. There is an SC ADM Risk Mitigation org unit (20010633) that reports directly to SC Administration. Do not use that one.

Using the steps you learned in exercise 3.2, find the appropriate org unit and answer the questions listed below in the Notes section.

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Notes

Questions:

1. Who is the holder of the Accountant II position?

2. In addition to looking in the Overview section, what other section displays holder information and how is it displayed?

3. Look at the section you identified in question 2 above. What should the *staffing status* indicate?

4. What position does Jennifer Johnson hold?

5. Who is the holder of the Accountant I position?

6. What Personnel Area is assigned to the OSC Admin Risk Mitigation org unit? How did you find this information?

7. How would you find the work schedule for the org unit? What are the work schedule hours?

8. Although the Accountant II position is vacant, does it have a work schedule assigned? If yes, what are the hours?

9. Why does this position have a work schedule if it is vacant?

* Use the Collapse icon in the overview section to close all of the org units.

* Use the Collapse icon in the Selection section to close all of the org units.

Instructor Demonstration #3.4

- Display Position and Person Details
  - Perform this transaction to display the master data details for an org unit.
  - Information:
    - Org unit – Office of State Controller

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Notes

In a moment your instructor will demonstrate how to display the details for a position and a person. Please refer to the next ten pages of your student guide and follow along while your instructor demonstrates and explains each tab.

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Notes

Position conventions

The object type for a position is "S".

The object ID number will begins with the number six (6).

Position details

Characteristics for each position are stored on tabs in the *Details* section of the *Organization and Staffing Display* screen. Some characteristics of positions are inherited from org units and jobs BEACON SAP is using these tabs to define positions:

- Basic data
- Cost Distribution
- Address
- Work schedule
- If applicable, "Comp" tabs when the position is eligible for compensation for overtime, holiday, shift differential, on-call pay, etc.
- Ref Position Number
- SOC/Retirement Code
- Position Type

Position Details – Basic data tab

Details for Position Accountant II

Basic data | Account assignment | Cost distribution | Address | Work schedule | OT

| Position | Acct II | Accountant II |
| Job | | ACCOUNTANT II | Valid On | 08/27/2007 |

☐ Head of own organizational unit   ☐ No periods

Staffing status   Vacancy occupied or put on hold

☐ Staff

Holder

| Icon | Holder | Percentage | Assigned as | Assig |
| | Perry C White | 100.00 | 08/22/2007 | Unlim |

Description

Subtyp

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Notes

The *Basic data* tab contains the position name, job information, chief position indicator (to signify if the position is the head of the org unit), and vacancy information.

Position Details – Account assignment tab

Details for Position Accountant II

Basic data | Account assignment | Cost distribution | Address | Work schedule | OT C

Valid from 08/15/2007
To   12/31/9999

Account assignment

		for master cost center
Controlling Area	State of North Carolina	
Master cost center	1400000000 OSC	Inherited from Office of the State Contr
Business Area	Office of the State Controller	Inherited from OSC - Administration D
Company Code	NC01 STATE OF NC	Inherited from OSC - Administration D
Personnel area	1401 State Controller	
Pers. subarea	NC01 7day Norm	

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Notes

The *Account Assignment* tab identifies the Personnel Area and Personnel Subarea and also identifies cost objects associated with the org unit.

Position Details – Cost distribution tab

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Notes

The *Cost Distribution* tab shows how the position costing is set up to be distributed. This is where you look to see if a position is split funded, denoted by two rows in the table, as shown in the following graphic.

Position Details – Work schedule tab

Details for Position Accountant II

Basic data | Account assignment | Cost distribution | Address | Work schedule | OT

Employee group/subgroup

Employee group: EPA Employees

Employee subgroup: A1   FT N-FLSAOT Perm

Valid On: 08/27/2007

No periods

Work schedule

Origin   Standard value

Working time   40.00   Hours of weekly working time

Approval   100.00 % of Standard value

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Notes

The *Work schedule* tab identifies the Employee Group and Employee Subgroup and the work schedule for the selected position.

Position Details – Other tabs

bEACON
North Carolina
Office of the State Controller
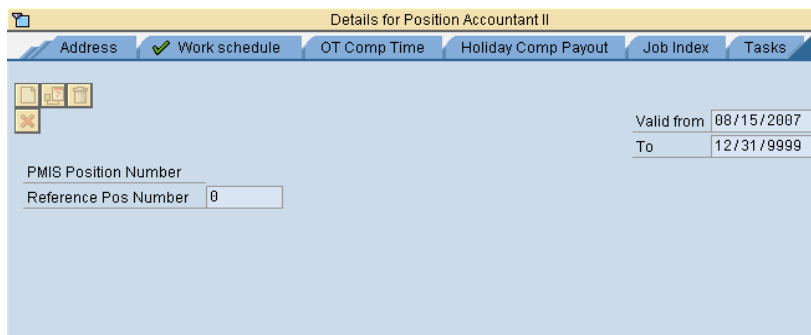
- The *Address* tab contains the main address, the mailing address, and a courier address for the position.
- "Comp" tabs - If a position is eligible for additional compensation such overtime compensation, holiday payout period, night shift premium, evening shift premium, weekend shift premium, holiday premium rate, on-call pay, and callback pay.
- The *Reference Position Number* tab stores the PMIS position number. This tab also stores a reference to an abolished position when the position was created to replace an existing position.
- The *Position Types* tab will indicate if the position is classified as emergency, essential, or key.

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Notes

Knowledge check:

Why is the reference position number field blank?

	Details for Position Accountant II					
Address	✔ Work schedule	OT Comp Time	Holiday Comp Payout	Job Index	Tasks	

Valid from 08/15/2007
To 12/31/9999

PMIS Position Number
Reference Pos Number 0

Position Details – SOC/Retirement Code tab

Details for Position Accountant II

OT Comp Time | Holiday Comp Payout | Job Index | Tasks | Ref Position Number | SOC/Retiremnt Code

Valid from 08/15/2007
To 12/31/9999

SOC Code 132010 Accountants and Auditors
County Code 092 Wake

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Notes

The data displayed on the *SOC/Retirement Code* tab is inherited from the job. The SOC code is used for EEO reporting by OSP. For graded positions, SAP will automatically assign the number. For banded positions, you will be prompted to select the number.

Exercise #3.4

- Display Position Details
  - In this exercise, You are the HR manager at the Office of the State Controller. The Risk Mitigation org unit was recently created. Your agency Personnel Director has asked you for complete details on the Office Assistant III position assigned to Risk Mitigation

- **Instructions**
  1. Use the Organizational and Staffing Display (PPOSE) instruction to complete the exercise scenario in SAP.
  2. Display the org structure down to the Position level of the Risk Mitigation section of the Administration Division for the Office of the State Controller.
  3. Answer the questions below in the Notes section after completing the org structure display.

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Notes

Use the steps you learned in the previous exercises and find the appropriate org unit. Answer the following questions.

Questions:

1. Is the Office Assistant III position a newly created position? How do you know?

2. What is the funding source for this position?

3. Who occupies this position?

4. What is the SOC code for this position?

5. Is the work schedule 40 hours?

6. How is the position work schedule assigned? How do you know this information? Could it have been different on this position from the default? If yes, why?

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Notes

Person conventions

The object type for a person (employee) is "P".

The object ID number is generated by the Retirement System.

Position details

Characteristics for each person are displayed on the *Basic data* tab. This tab shows the job assigned to the position which is held by the employee.

Person Details

Details for Person Perry C White

Basic data | Qualification | Tasks

Position assignment 09/05/2007

Icon	Existence	Position	Job	Organizational unit	Perce	Valid On	09/05/2007
		Accountant II	ACCOUNTANT II	OSC - Administration Division	1	No periods	

Personnel No 98221018   Name   Perry C White
EEGroup   K   EPA Employees   PersA 1401 State Controller
EESubgroup A1   FT N-FLSAOT Perm   Statu   Active

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Notes

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Notes

Click the Print button on the Overview Area's toolbar to see a print preview of the structure that you have selected.

Brain Teaser Trivia

10

10   2   10

10

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Notes

Lesson Review

In this lesson you learned how to display your agency's organizational structure using the Display for Org Units and Positions, PPOSE, transaction.

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Notes

Knowledge Check – Lesson 3

Terms	Definitions
	The highest org unit of financial accounting (NC01)
	Defines a specific agency within the State
	The position responsible for managing transactions within an org unit
	Employees - persons are assigned directly to positions which are described by jobs and assigned to an org unit
	Represent any type of organizational entity found in the State and are assigned to cost objects
	Provides a general classification of tasks that are routinely performed together and is used to describe several positions.
	Described by a job and related to an org unit. As a general rule may be held by one person
	A description of the employee's position in the State.
	Provides legal and reporting requirements, including the Company Code, Personnel Area, Personnel Subarea, and Cost Center
	Defines the hierarchical relationship between organizational management objects including org units, jobs, and positions

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Notes

Match the following terms to the definitions listed in this slide.

1. Chief Position
2. Company Code
3. Enterprise Structure
4. Job
5. Org unit
6. Organizational Structure
7. Person or Holder
8. Personnel Area
9. Personnel Structure
10. Position

OM200 – Organizational Management Overview

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Course Review

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Notes

Lesson Objectives

After completing this lesson, you should be able to:

- Identify key user roles and business process partners
- Identify what is changing
- Identify OM reports

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Notes

Business Background

- The State of North Carolina currently uses Direct Entry System, an electronic forms processing module, for processing employee personnel actions (PD105) and position actions (PD118).
- The "forms" are entered on mainframe screens and are routed to various forms queues for necessary approvals.
- A record of each action taken, and by whom, is captured within the system with dates and timestamps.
- Forms are created at the Division or Agency level and require various approvals, depending on the type of action, the job classification, and whether an exception to policy is being requested.
- After all necessary approvals have taken place, the personnel action is posted to the PMIS system.

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Notes

High-level Overview of OM Processes

Activity	Agency and Department HR	BEST Shared Services
Organizational processing includes adding, changing, or deleting (delimiting) an org unit.	Submits the approved *Organization Request* form to BEST Shared Services via postal mail, fax, or email.	Customer Contact – Verifies form is legible, from an authorized person, and follows other basic guidelines. Processing and Transactions – Creates, changes or delimits org units in SAP.

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NOTE: Org units are not currently captured in PMIS.

Notes

High-level Overview of OM Processes (Con't)

Activity	OSP	BEST Shared Services
Job Processing, includes creating, changing, deleting (delimiting) jobs, branches, and families.	Completes the *Job Request* form. Once all approvals have been obtained, submits form to BEST Shared Services via postal mail, fax, or email.	Customer Contact – Verifies form is legible, from an authorized person, and follows other basic guidelines. Processing and Transactions – Creates, changes or delimits job, branch, and family in SAP.

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Notes

Job Processing

The Office of State Personnel is generally responsible for establishing, revising and maintaining the Classification Plan. For each class established by the State Personnel commission, a class standard is prepared. Standards may be written in several forms. The most frequently used are specifications and benchmarks. In SAP these classifications are referred to as "Jobs".

Jobs are used to describe the duties and responsibilities of positions and serve as descriptions that apply to several positions with similar tasks or characteristics. When a new position is created, it can be related to a *job* that already exists in the SAP system. The position will then automatically inherit the characteristics of the *job*. This relationship will make it easier to create positions that are similar or the same, as it will not be necessary to assign characteristics to each individual position.

High-level Overview of OM Processes (Con't)

North Carolina
Office of the State Controller

Activity	Agency and Department HR	Approvers	BEST SS
Position Processing	• Agency HR professional initiates action • OM Position Requestor processes position action in planned status in SAP • OM Position Requestor initiates workflow approvals	If required the following approvals occur • Agency Salary Control Officer (Agency Position Funding Approver) approves the actions after entering the cost distribution and position salary or rejects the actions. • If needed, the OSBM Position Funding HR approves or rejects position action. • If needed, the OSP Position approver approves or rejects position action. • Agency Position approver approves or rejects the position action.	Customer Contact – Upon final approval notified by Workflow converts position action to active status in the SAP system. **NOTE**: SAP will automatically send a record of the action to the Salary Control System for necessary updates and reporting.

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Notes

Position Actions

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Action	Reason	Remarks
Fund/ New Position Re-Establish Position		Fund position and New Position (Establish Position) are being combined into one action.
Reallocation Action	•Reallocate – Up •Reallocate – Down •Reallocate – Horizontal •Adjustment from Auth •Reallocate – Differential •Remove Differential	A Reallocation is a change in the job classification of a position. The position salary might also change on a reallocation.
Position Abolished		Delimit the position.
Position Transfer		Position transfer is the movement of a position from one org unit to another.
Position Hours Change		This is a change in the hours of a part-time, less than 40 hours per week, position.
Position Type Change	FLSA change Position Type EPA to SPA SPA to EPA Full-Time to Part-Time Part-Time to Full-Time	This is a change in the employee group and employee subgroup that may also change the position from full-time to part-time and vice versa. It may involve a change from time-limited to permanent or from FLSA subject to FLSA non-subject.
County change		You will update county code on IT9022 (**NOTE**: Often the funding changes when the county changes).
Title change		Maintain position title.
Reporting change		Change the relationship (A012) to reflect the new supervisor.

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Notes

Notes

1. An agency HR professional initiates a request for a new position (Fund and establish position are combined).
   - Position number is created.
   - Job class, title, grade, and org unit are provided.
2. The request is routed to Agency Salary Control Officer, who enters the cost distribution and position salary. The Salary Control Officer then approves or rejects the action.
3. The request is routed to OSBM for approval.
4. The request is routed for all required HR approvals.
5. Upon final approval, the action is active in the SAP system.
6. A record of the action is provided to the Salary Control System for necessary updates and reporting.

High-level Overview of OM Processes (Con't)

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Office of the State Controller

Activity	Agency and Department HR	BEST Shared Services
Position Vacancy Posting process.	Provide paper document on position vacancy posting to BEST Shared Services	Post position vacancies for small agencies
Legislative Increases		SAP Production Support team will process requests
Mass edit of budgeted positions		SAP Production Support team will process requests
Work Against		SAP Production Support team will process requests

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Notes

Brain Teaser Trivia #5

LAL

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Notes

BEACON Reporting Solutions

- OM reports that are standard SAP reports are available in SAP ERP system
- OM reports that are customized are available in SAP Business Intelligence (BI) system

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Notes

SUMMARY OF BUSINESS RULES

Users can generate reports in SAP based on their *SAP user profile* and *SAP (security) authorizations* also referred to as HR security roles or process roles. Some data is protected from view by authorizations, such as salary data, meaning that only users who are allowed to see that specific data will be able to access it.

You will have the opportunity to learn more about navigating in BI by completing the Reporting Overview, BC120, online course.

OM Reports for Jobs in SAP ERP (1 of 3)

SAP Transaction Code	Report Group	Report Title
S_AHR_61016497	Job	Existing Jobs
S_AHR_61016491	Job	Existing Org Units
S_AHR_61016498	Job	Job index
S_AHR_61016495	Job	Org. Structure with Persons
S_AHR_61016494	Job	Org. Structure with Positions
S_AHR_61016493	Job	Organizational Structure
S_AHR_61016492	Job	Staff Functions for Org. Unit

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Notes

This slide lists the standard SAP reports for jobs.

Refer to the *OM Reports available in SAP ERP* job aid for more information about each report.

OM Reports for Positions in SAP ERP (2 of 3)

SAP Transaction Code	Report Group	Report Title
S_AHR_61016502	Position	Existing Positions
S_AHR_61018831	Position	Obsolete Positions
S_AHR_61018869	Position	Periods of unoccupied positions
S_AHR_61016513	Position	Reporting Structure with Persons
S_AHR_61016512	Position	Reporting Structure Without Persons
S_AHR_61016503	Position	Staff assignments
S_AHR_61016505	Position	Task Description for Positions
S_AHR_61016509	Position	Vacant/Obsolete Positions

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Notes

This slide lists the standard SAP reports for positions.

Refer to the *OM Reports available in SAP ERP* job aid for more information about each report.

General OM Reports in SAP ERP (3 of 3)

SAP Transaction Code	Report Group	Report Title
S_AHR_61016528	General	Structure Display
S_AHR_61016531	General	Display Infotypes
S_AHR_61016532	General	Infotype Reporting

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Notes

This slide lists the general standard SAP reports.

Refer to the *OM Reports available in SAP ERP* job aid for more information about each report.

Demonstration #4.1

- **Execute the *Job Index* report (S_AHR_61016498)**
  - Perform this transaction for example your agency Deputy Director has asked you to run the *Job Index* report to identify all positions attached to the Driver Education Field Supervisor job.
  - INFORMATION (most often required):
    - Job Search – "Driver Ed*"

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Notes

Demonstration #4.1: Execute the Job Index report

Observe as your instructor runs the S_AHR_61016498 – Job Index report to identify all positions attached to a particular job. Your instructor will also demonstrate how you can export the report to Microsoft Excel using the **List > Export > Spreadsheet** menu option.

OM Reports in BI

B0117	Active Position Counts
B0126	Dashboard: Vacancy Rate
B0029	EEO Planning by Org Structure
B0165	Job Attributes
B0055	Labor Force Trends
B0056	Lapsed Salary
B0063	Legislative Increase by Position
B0070	On-Call Eligibility List
B0071	Organizational Hierarchy
B0077	Position Attributes
B0078	Position Attributes – Dates for Hiring
B0113	Position Changes by Period
B0118	Position Counts Over Time
B)149	Positions by Funding Source

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Notes

In addition to the standard SAP reports, custom reports will be accessible using the BI reporting tool.

Refer to the *OM Reports available in BI* job aid for more information about each planned report.

OM Reports in BI (Con't)

B0076	Senate Bill 222 IT Expenditures Report (planned personnel expense by cost center)
B0096	Supervisor/Employee Relationships
B0169	Vacancy History (Last 12 Months)
B0168	Vacancy Postings
B0104	Vacancy Report

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Notes

You will learn how to use the BI reporting tool in the *Reporting Overview and Navigation*, BC120, course.

Refer to the *OM Reports available in BI* job aid for more information about each report.

Lesson Review

In this lesson, you learned to:
- – Identify key user roles and business process partners
- – Identify what is changing
- – Identify OM reports

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Notes

Brain Teaser Trivia

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Notes

Course Map – Organizational Management Overview

Lesson 1: PA Overview

Lesson 2: OM Concepts

Lesson 3: Displaying the Organizational Structure

Lesson 4: OM Processes and Reports

Lesson 5: Course Review

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Notes

Course Objectives

- In this course you learned to
    - Define Organizational Management (OM)
    - Identify components of the OM structure
    - Display the organizational structure in SAP for your agency/department
    - Identify OM reports

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Notes

This course is intended to give HR professionals an understanding of SAP's Organizational Management module. This course provides you with demonstration and practice for displaying the organizational and staff assignment structure.

Course Review

- Questions for review:

  1. What is the hierarchical relationship between org management objects called?
  2. What are components of organizational management that are linked together to create an organizational hierarchical structure for North Carolina State Government called?
  3. What transaction allows you to view organizational structure, positions, and holders hierarchical tree structure making it easy to org units, positions, and employees?
  4. What OM Object is synonymous with employee?
  5. What org unit is responsible for creating and maintaining org units and jobs in the SAP system?
  6. What OM object inherits planned compensation and other attributes for a job?
  7. What do we call data relating to employees that remains constant over a period of time, such as personnel number, position, and SS#?
  8. True/False: Persons (employees) occupy jobs.

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Notes

Course Review (con't)

9. The start and end dates for each record in SAP are called _____ _____.

10. What is the abbreviation for instructions which are typed into the Command field and used to bypass menu paths to go directly to a transaction?

11. What object is described by a general classification of duties which describe a position?

12. What object ID number is assigned by the Retirement System?

13. What do we call the connections that exist between OM objects?

14. What structure defines employee type, employee group, and employee subgroup?

15. True/False: A position is described by a job.

16. What is the OM object called that manages the organizational unit? (The SAP icon that represents me wears a red hat.)

17. What is the SAP reporting tool with drop and drag features?

18. What structure contains the legal reporting requirements including company code, personnel data, and cost center?

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Notes

OM200 – Organizational Management Overview
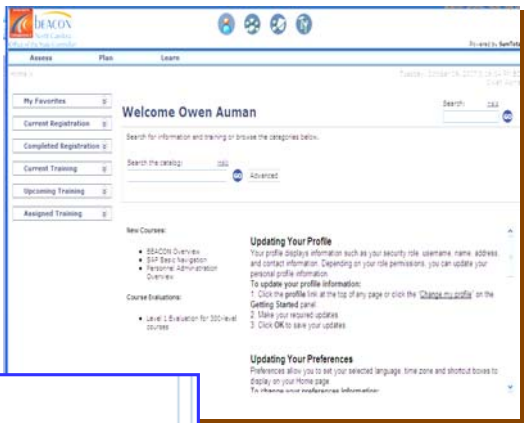
Notes

Level 1 – Course Evaluation

Level 1 evaluations are used by the BEACON Training Team to ensure students are experiencing their instruction in an environment and method that is conducive to learning.

Course Evaluations:

* Level 1 Evaluation for 300-level courses

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Notes

Level 1 Evaluations

The Level 1 evaluation for 100 and 200 level classes will continue to be accessed as directed in previous instructions (**Learner Home Page > Learn > Evaluations**).

Level 2 – Course Assessment

Access the Level 2 Assessment from the Core Users link on the BEACON University website.

– Level 2 assessments will have the corresponding course set as a prerequisite, so the curious user will not be able to launch the assessment before completing the class.

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Notes

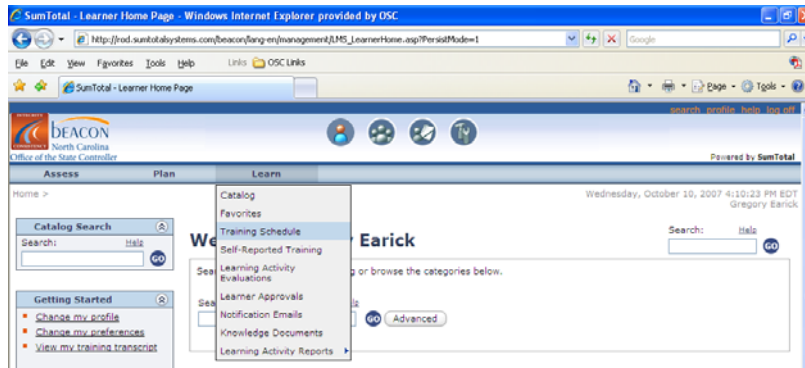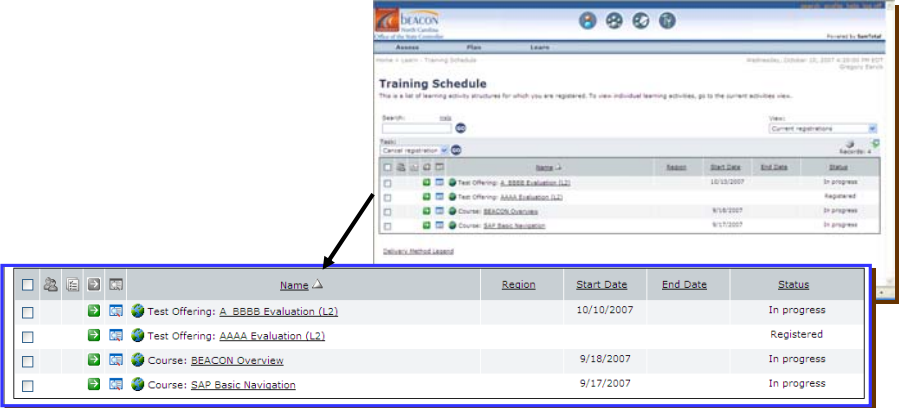The assessment is listed on a learner's Training Schedule. The Training Schedule can be accessed from the Learner Home Page within the Core Users section of the BEACON University. Follow the menu path *Learn* > *Training Schedule* as shown above.

Continue to the next slide for additional instructions on how to access the Level 2 Assessment.

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Notes

All Level 2 assessments will be titled with the course code followed by "Evaluation Level 2" so that they may be easily distinguished from the actual class listed in the schedule.

Depending on their security settings, the learner may be asked to allow an Active X component to run.

After selecting an answer for each question, click once on the Score my Quiz button at the bottom of the screen. The user will receive feedback for each answer they have chosen and a statement of the number of correct answers.

A dialogue box asking learners to choose to open or save the file ContentAdaptor.asp may appear for learners with moderately restrictive security settings. Learners should click the Cancel button on the dialogue box. This will not interfere with the learner's score and completion status being sent to the LMS.

Learners should close the assessment window by clicking the X in the upper right hand corner. After returning to the LMS window, the LMS will load a page that reflects the user's score and completion status. Learners may click the OK button at the bottom of the screen to return to their Training Schedule or they can click the Log Off link in the upper-right corner of the screen to leave the LMS.

Next Steps

- Monitor BEACON communication
- Review conceptual materials
- Access BEACON help
  - Access from an SAP transaction
  - Access on line at http://help.mybeacon.nc.gov/beaconhelp
- Practice what you've learned
  - URL: https://mybeacon.nc.gov
  - Client 899
  - Use your current NCID user name and password
- Schedule Practice Sessions
  - Transition Centers
  - Schedule a practice session

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Notes

Continue to monitor updates on the BEACON University website for information regarding the project and future training that you are scheduled to attend.

Review your student guide to ensure you are ready for go live. Keep the materials close by as a ready reference.

Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. You will be denied access to other training clients, so ensure you enter the correct client number before attempting to log on for your practice session. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance after go live?

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.

CONGRATULATIONS

You have completed the course

Please complete your course evaluation!

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Notes

Demonstration and Exercise Summary

Number	Transaction	Description	Type	Page #
3.1	Logging on to SAP		E	58
3.2	PPOSE	Display Organizational Structure	D + E	59, 63
3.3	PPOSE	Display Org Unit Details	D + E	64, 70
3.4	PPOSE	Display Position Details	D + E	71, 79
4.1	S_AHR_61016495	Execute the *Existing Jobs* Report	D	100

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Notes

Knowledge Check – Lesson 1

T	F	Question
	F	1. The Employee Subgroup arranges employees by their type of status, and establishes business rules for calculating leave.
	F	2. The Employee Group defines more detailed and specific processing for payroll calculation rules, for example, if employee is subject or not subject to FLSA.
T		3. The Payroll area describes the pay frequency and payroll cycle for each employee.
T		4. The company code is the highest level of the company structure as defined by Finance.
	F	5. The Personnel Area further defines employees in order to identify various working schedules so that Time Management can define groups of specific time entry rules.
	F	6. The Personnel Subarea is used to identify the specific agency for whom the employee works.

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Notes
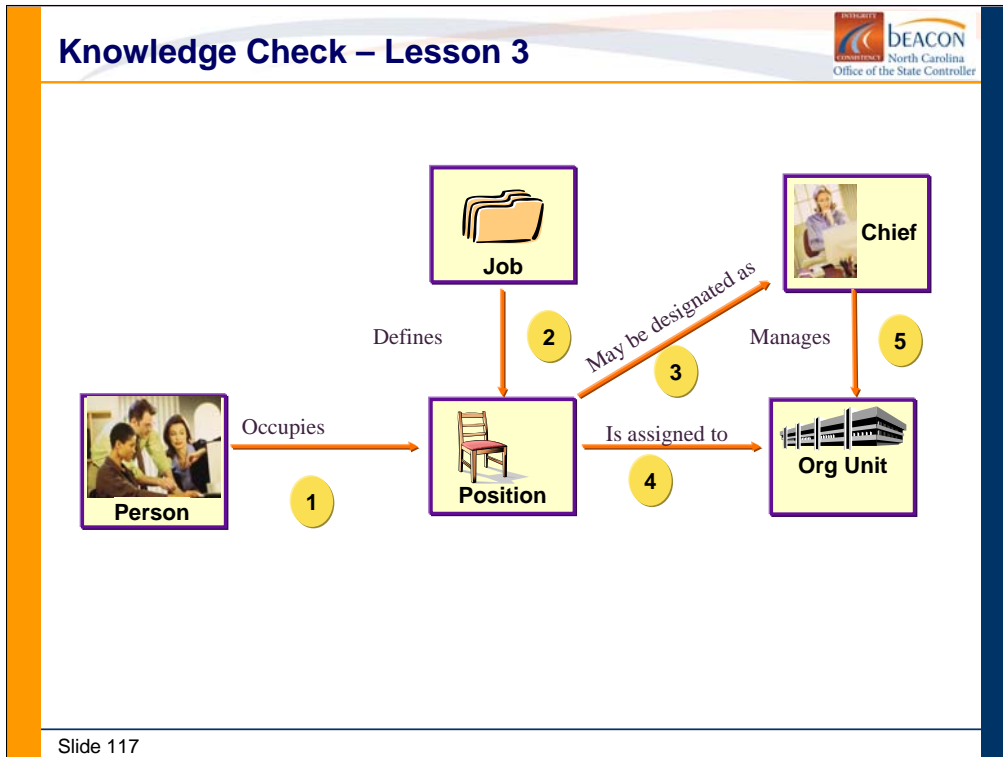
Answers

1.   A person **occupies** (holds) a position.
2.   A job **defines** a position.
3. A position **may be designated as** chief. In other words, a chief is also a position.
4. A positions **is assigned to** an org unit
5. A chief **manages** an org unit

Notes

Knowledge Check – Lesson 3

Terms	Definitions
2 - Company Code	The highest org unit of financial accounting (NC01)
8 - Personnel Area	Defines a specific agency within the State
1 - Chief Position	The position responsible for managing transactions within an org unit
7 - Person or Holder	Employees - persons are assigned directly to positions which are described by jobs and assigned to an org unit
5 - Org Unit	Represent any type of organizational entity found in the State and are assigned to cost objects
4 – Job	Provides a general classification of tasks that are routinely performed together and is used to describe several positions.
10 – Position	Described by a job and related to an org unit. May be held by one person or many people
9 - Personnel Structure	A description of the employee's position in the State.
3 - Enterprise Structure	Provides legal and reporting requirements, including the Company Code, Personnel Area, Personnel Subarea, and Cost Center
6 - Organizational Structure	Defines the hierarchical relationship between organizational management objects including org units, jobs, and positions

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Notes

Brain Teaser Trivia Answer Sheet

Total Loss

Tuna fish (2na fish)

No one to blame

Down to earth

Too intense

All mixed up

Someone's following me!

Slide 119

Notes